



PIC Development Sub Module Merging Two or More Units Job Aid

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A PHA might want to merge two or more smaller units into one larger unit to better match the demand in the local rental market. For example, two zero-bedroom units might be merged into one 1-bedroom unit. There are two parts to the task, which are outlined in this document as well as other related information.

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Before the work is started in PIC

Some of the work in PIC can be done by a PHA user, but some of it can only be done by a HUD user. To ensure that the entire process is completed, it may be advisable that a HUD user do all the work up through step 11. There are two things that should be done before the work in PIC begins.

1. **Document the “before” picture.** It is a good idea before beginning any work to print a copy of the Unit Detail Report, if you don’t already have one, to have a “before” snapshot of the units involved.
2. **Collect the information you will need.** A sample data collection model is included [later in this document](#). It asks for the minimum amount of information that is needed to document the work being done in PIC and is needed by the HUD user to support the work they will do in the system. The HUD staff person may need to ask the PHA additional questions related to program rules and finances as well, but those are not needed for the PIC data entry.

Step 1 – Change the Bedroom Count

If there is a change in bedroom count for the unit that will continue to exist, either the user (PHA or HUD, see note above) will need to change the number of bedrooms for that unit. The user will:

1. In the Development sub module select the PHA and development number, if the PHA has more than one, on the Development Profile page.
2. Single click on the Unit tab to navigate to the Unit List page.
3. Single click on the unit number that needs to have its bedroom count changed on the Unit List page. The Unit Details screen for that unit will appear.
4. Next to the Bedroom Count label, change the number of bedrooms in the text box.
5. Single click on the Update Unit Details button. *If the PHA does this step, it is imperative that the HUD user completing step 2 of this process verify the bedroom count using the data collected.*

Step 2 – Change the Unit Designation

To complete the process to change the Unit Designation for the unit(s) where the space is becoming part of the larger unit as a merged unit, a HUD user will complete the following steps. PHA users do not have the rights to do these steps.

1. In the Development sub module select the PHA and development number, if the PHA has more than one, on the Development Profile page.
2. Single click on the Unit tab to navigate to the Unit List page.
3. Single click on the unit number that needs to be marked as merged on the Unit List page. The Unit Details screen for that unit will appear.
4. Single click the “Unit Designation” link that appears in the screen print below.

The screenshot displays the 'Unit Information' screen. On the left is a navigation menu with links: 'pic', 'Wendalyn Hovendick', 'PIC Main', 'Housing Agency', 'Development', 'Inventory Removals', and 'Logout'. The top navigation bar includes 'Reports', 'Maintain Inventory', 'CAPFUND B&U Certification', 'Development', 'Building', 'Unit', 'Submission', and 'Approval'. Below this is a red header bar with 'Unit List', 'Building/Unit Data Transfer', and 'Upload Error Report'. The main content area is divided into two columns. The left column contains fields: 'Unit Number: 107', 'Entrance Number: 1', 'Door Number: [input]', 'Bedroom Count: 1', 'Unit Designation: General Occupancy [Modify]', 'Unit Tenant Status: Vacant [Modify]', 'Effective Date: 07/16/2012', 'ACC Unit Indicator: Yes (selected) No', and 'Cap Fund Indicator: Yes (selected) No'. The right column contains: 'Building: 4', 'Building Entrance Address: 705 WEST SEWARD', 'Floor Number: 1', 'Submission Status Type: Initial Approval Completed', 'Accessible Designation: Not Applicable [Modify]', 'ACC Unit Indicator Date: 04/30/1965', and 'Op Fund Indicator: Yes (selected) No'. Below these is a red bar for 'Head of Family Details' with fields for 'First Name', 'Last Name', and 'Occupancy Date', all marked with a red dash. At the bottom right is an 'Update Unit Details' button.

5. A page will appear where you can select the new unit designation. Select “Merged Unit” from the New Unit Designation drop down box. You can also enter any comments you want that describe this change. For instance, you may state that unit __ is merging with unit __. Since this is not a required field you can also leave it blank. You won’t see the comments displayed in the system but they are saved to the database. You do not need to make a selection in the reason for change drop down box. Single click on the Save button to save the changes and be taken back to the Unit Details page for the unit.

Unit Information

Unit Number: 107 Building - Entrance Number: 4.1

Current Unit Designation: General Occupancy

New Unit Designation: Merged Unit

Reason for change in Unit Designation: Change In Use

Comments:

The changes will be effective in the system immediately upon clicking "Save".

Save **Cancel**

- You now can change the bedroom size for the unit to 0. Delete the current bedroom count and enter zero. Single click on the Update Unit Details button to save the change.

Unit Information

Unit Number: 107 Building: 4

Entrance Number: 1 Building Entrance Address: 705 WEST SEWARD

Door Number: 1 Floor Number: 1

Bedroom Count: 1

Unit Designation: Merged Unit

Unit Tenant Status: -

ACC Unit Indicator: Yes No

Cap Fund Indicator: Yes No

Submission Status Type: Initial Approval Completed

Accessible Designation: Not Applicable

ACC Unit Indicator Date: 04/30/1965

Op Fund Indicator: Yes No

Head of Family Details

First Name: -

Last Name: -

Occupancy Date: -

Update Unit Details

- A page will come up that will ask you for a reason for the change. In the reason for change drop down box select "Bedroom Count – Merged Units". You can enter comments to be saved into the database, similar to what you entered for the Unit Designation change, if you wish but it is not required. Single click on the Save button. You will be taken back to the Unit Details page.

Unit Information

Unit Number: 107 Building - Entrance Number: 4.1 Current ACC Unit Indicator Date: 04/30/1965

Unit Details Changes

Unit Details Field	Current Value	New Value	Reason for change in unit details	Comments
Bedroom Count	1	0	Bedroom Count - Merged Units	

Save **Cancel**

- You now need to update the ACC indicator. Single click on the No radio button to the right of the ACC Unit Indicator label. A pop-up box will appear to let you know that this will also change the Op Fund and Cap Fund indicators. Single click on the OK button. The pop-up box will disappear. Single click on the Update Unit Details button to save the change.

Unit Information

Unit Number: 107
 Entrance Number: 1
 Door Number: 0
 Bedroom Count: 0
 Unit Designation: Merged Unit [Modify]
 Unit Tenant Status: -
 ACC Unit Indicator: ☐ Yes ☒ No
 Cap Fund Indicator: ☒ Yes ☐ No

Head of Family Details

First Name: -
 Last Name: -
 Occupancy Date: -

Update Unit Details

- On the page that appears select “Change In Use” from the reason for change drop down box. Similar to the previous steps, enter any comments you want saved to the database. You will need to enter the date the merge of the units was completed in mm/dd/yyyy format in the ACC Unit Indicator Change Date text box. Single click on the Save button to update the ACC, Op Fund, and Cap Fund indicators and the ACC Indicator Change Date.

Unit Details Changes

Unit Details Field	Current Value	New Value	Reason for change in unit details	Comments
ACC Unit Indicator	Y	N	Change In Use	

ACC Unit Indicator Change Date: MM/DD/YYYY

Save Cancel

- You will be returned to the Unit Details page. The changes will be reflected on the page. You will also see entries for the changes to unit designation and unit status at the bottom of the page under the Unit Status/Designations Change History heading.

Next Steps for the PHA

The PHA must review all the building and unit data, not just the units involved in the merge, and submit it in PIC for field office approval under the Submission tab.

Next Steps for HUD

Once the PHA submits the building and unit data in PIC, the field office must review all developments, buildings, and units – not just those that are involved in the merge – and decide if the data submitted matches what was provided by the PHA. If the data is approvable, the HUD user will approve all developments under the Approval tab. After the approval occurs, the system will archive the data and it will become part of the official inventory for funding and historical purposes.

Note: The field office should not reject any of the developments unless there is something substantially in error. If any developments are rejected the data needs to be corrected right away and the PHA resubmit the building and unit data for approval. Any developments in rejected status are not included in official unit counts and may affect funding.

Sample Merged Unit Data Collection

The format below can be used to request information from PHAs on what units are involved, their characteristics, and effective date. This can be copy and pasted into an email and then once the responses are received back that information can be kept on file for documentation of what changes were made.

1. Unit numbers involved and their bedroom sizes before merging:
 - ✓ Unit ____ was a ____ bedroom
 - ✓ Unit ____ was a ____ bedroom
2. Unit number that will be used for occupancy and its new bedroom size:
 - ✓ The unit that remains that the tenant will enter through is unit ____ and it is now a ____ bedroom.
3. Date the merge was complete (units were considered one unit):
 - ✓ The units were considered one unit as of _____ (in mm/dd/yyyy format).

If the data for the previous configuration as provided above does not match what is in PIC the field office will work with the PHA to determine why there is a mismatch.

Additional Information

- In situations where more than two units are merged please add the necessary line(s) under #1 keeping the same format.
- If more than two units are merged into two units – for instance 3 units are merged into 2 – please add additional line(s) to #1 and #2 keeping the same format. If this situation occurs and the work is completed on separate dates add another line under #3 keeping the same format.